

# Report Developer Workshop

August 2015



**BREAZ**  
BUSINESS RE-ENGINEERING ARIZONA

# Agenda

- Reporting Overview 1:00 – 1:15
- InfoAdvantage Reporting Capabilities Demo 1:15 – 1:40
- Common Questions And Answers 1:40 – 2:00
- Workstation Configuration Requirements  
and Trouble Shooting 2:00 – 2:15
- Report Development Process 2:15 – 2:25
- Report Developer Support 2:25 – 2:30

**Tiffany Franks**

GAO Reporting Manager

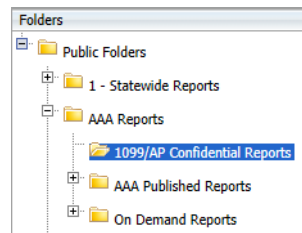
# REPORTING OVERVIEW

# InfoAdvantage

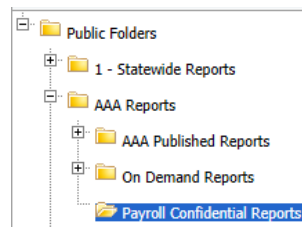
- Security Roles
- Report Developer Prerequisite Skills
- Scheduled (Published) Reports versus Interactive (On-demand) Reports
- Folder Structures and Access
  - Statewide vs Department Folders
  - Recommendations for Managing Department Folders

# Security Roles

- Reporting Security Role / Access and Capabilities
  - XXX\_INFO\_1099AP – Ability to view reports in the Agency 1099/AP Confidential Folder



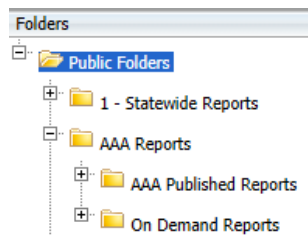
- XXX\_INFO\_PYRL – Ability to view information in the Payroll Confidential Folder
- XXX\_INFO\_HRIS – Ability to create reports with the HRIS universe.



\*All AFIS Users have access to infoAdvantage, but can only view Published Reports

# Security Roles

- Reporting Security Role / Access and Capabilities
  - XXX\_INFO\_DVLPR – Ability to create reports within infoAdvantage, excluding HRIS and confidential information
  - INFO\_INTRCT – Ability to run interactive reports in the Statewide or Agency specific folder
    - There are no restrictions on users have this reporting role
    - Report Developers can create the necessary agency reports then Interactive Report users can run these reports; Report Developers do not need to run / email reports to users



# Security Roles

- Required (8/1/15) CBTs for Training
  - Navigation Basics (AFINB\_S)
  - Beyond the Basics (AFISBB\_S)
  - Chart of Accounts (AFISCOA\_S)
  - Document Approval (AFISDOC\_S)
  - End User Reporting (AFISRPT\_S)

# Report Developer Prerequisite Skills

- Prior report development experience
- General understanding of data warehouses, Business Intelligence reporting using any tool (Cognos, Crystal Reports)
- Required skillset: Excel, databases, SQL
- Required skillset: Understanding of Financial system and transactions for agency
- Desirable skillset: BusinessObjects
- Attend the AFIS Report Developer training

# Report Types



## Scheduled

- aka Published Reports
- Runs automatically at night
- May be “burst” by Department
- Published to Agency ‘XXX Published Reports’ folder

Launch

## Interactive

- aka On Demand Reports
- Available to run on demand
- May require prompts such as Dept, FY and APD; other prompts may be available
- Export (save) as PDF or Excel

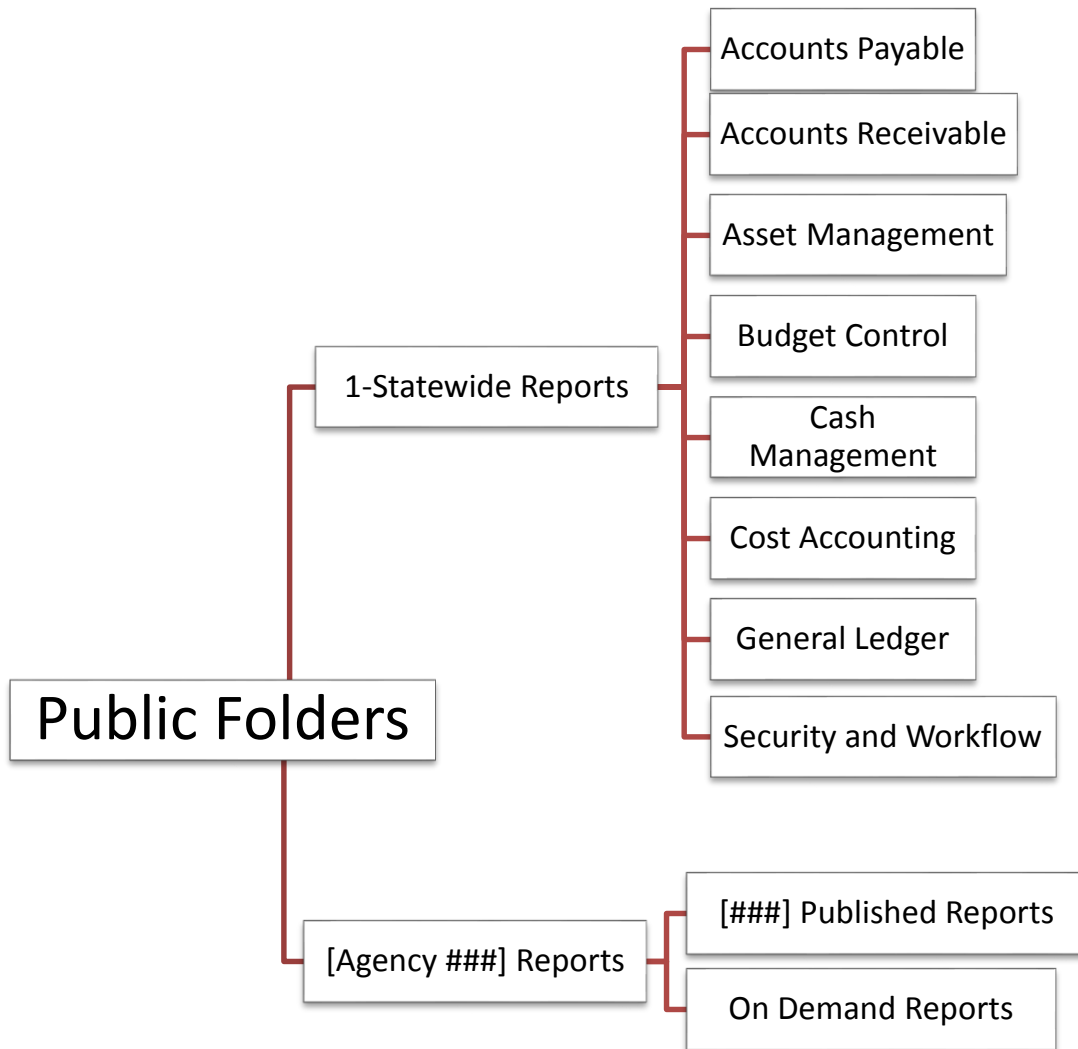


## Baseline

- Basic out-of-the-box reports
- Several replaced by AZ “clones” with added Department prompt
- Several replaced to use AZ Budget Structures



# Folder Structures



- Statewide folders contain all on-demand reports that can be run by all agencies

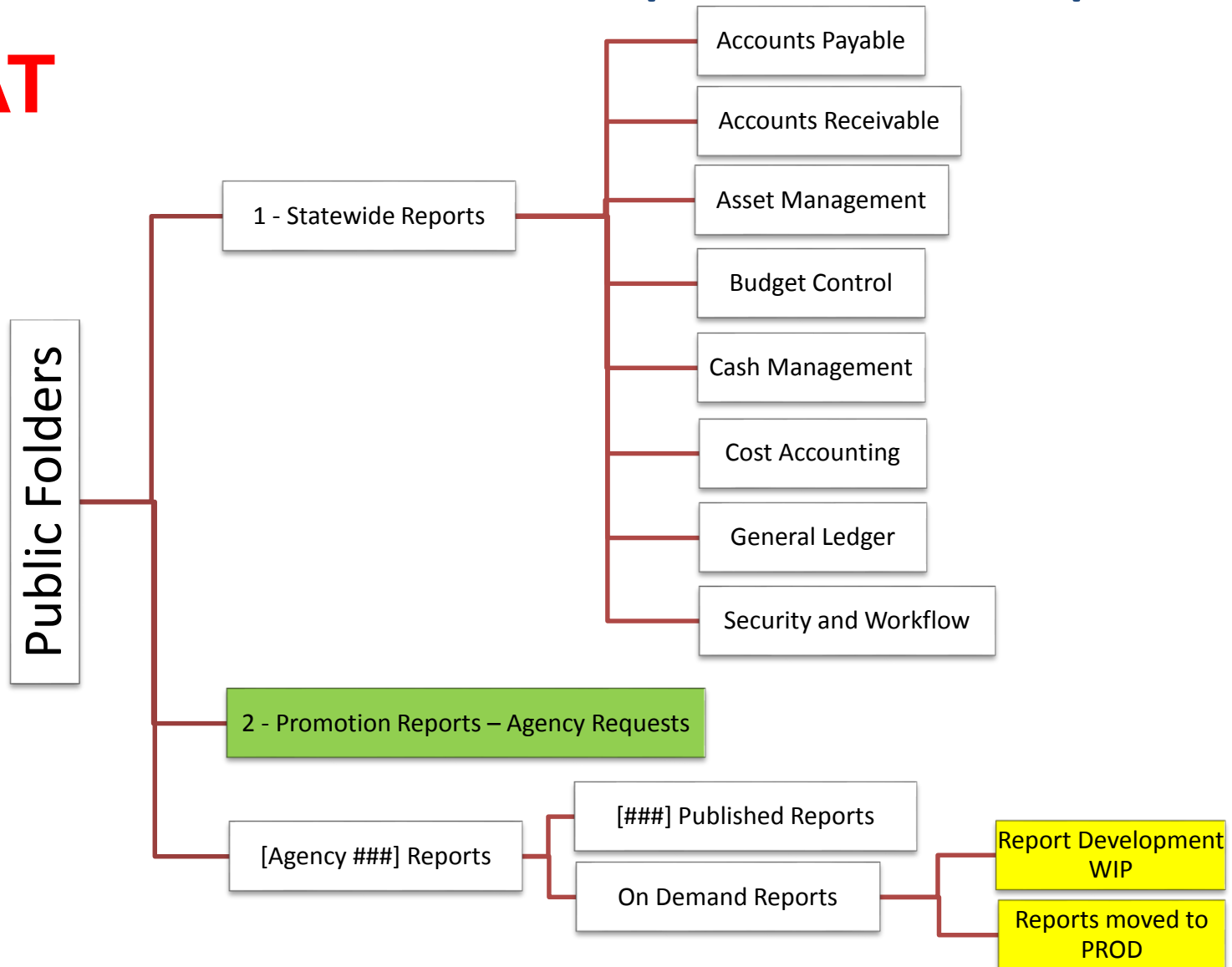
- Scheduled reports are “burst” to the Agency “Published Reports” folder
- Agency-specific reports should be stored in the Agency’s “On Demand Reports” folder

**Amy Aeppli**  
GAO Reporting Lead

# REPORT DEVELOPMENT PROCESS

# Folder Structures-Report Development

UAT



# Email Request

- Send email request to
  - BREAZ: [BREAZ@azdoa.gov](mailto:BREAZ@azdoa.gov)
  - Kevin McRee: [Kevin.Mcree@azdoa.gov](mailto:Kevin.Mcree@azdoa.gov)
  - Ramakrishna Pakki: [Ramakrishna.Pakki@azdoa.gov](mailto:Ramakrishna.Pakki@azdoa.gov)
  - Amy Aeppli: [Amy.Aeppli@azdoa.gov](mailto:Amy.Aeppli@azdoa.gov)
  - Tiffany Franks: [Tiffany.Franks@azdoa.gov](mailto:Tiffany.Franks@azdoa.gov)
- Sample Email Content:
  - We have submitted the below to the Promotion Reports – Agency Requests folder in the UAT environment. Please advise of any fixes needed and confirm when moved to Production.
- Report will be moved from “2 - Promotion Reports – Agency Requests” folder to the Agency “On Demand Reports > Reports moved to PROD” folder after promoted to PROD

**Amy Aeppli**

GAO Reporting Lead

# DEMONSTRATE REPORTING CAPABILITIES

# Report Development

- Modifying an existing Statewide Report
- Add/Remove Objects
- Filters/Prompts
- Formatting

# Modifying Statewide Report

- COPY
  - Right click the report you wish to copy
  - Select **Organize > Copy**
- PASTE
  - You can paste report in **My documents > My Favorites** folder or in **Agency On Demand Folders**
  - Navigate to the required folder
  - Right click on a blank area and select **Organize > Paste**

# Add/Remove Objects

- Click on **Design** view to be in Design mode
- Go to **Data Access** and click on **Edit**
- Drag objects from or to the **Universe Outline** to the **Result Objects** section

**Note:** All newly added objects to the Result Objects pane in the query panel are not automatically added to the report

- To see the object on report, manually add the object to the report

# Filters/Prompts

- A filter limits the data retrieved from the dataset. It can be either set to constant values or to prompts
- Prompts –filter that the user inputs when the report is refreshed
- Query Filters are created/removed by dragging and dropping dimensions from **Universe Outline** to **Query Filters** Pane
- Report Filters can limit the values displayed on an individual report (hides data from being displayed)

# Formatting

- Formatting Tab
  - Font Options
    - Such as Font type, Font Size, Bold, Italics, Underline, Font Color, Fill, Alignment, Clear Formatting
  - Border Options
    - Such as Borders, Border Colors
  - Cell Options
    - Such as Merge cells, Clear conditional formatting on cells
- Sorting
  - **Analysis** Tab > Click on **Sort** > Choose required **Sort** Condition (Ascending or Descending)

**Amy Aeppli**  
GAO Reporting Lead

# COMMON QUESTIONS & ANSWERS

# Common Q&A

- Will updates to a report design also update those I copied to My Favorites or Agency folder?
  - No, you would need to copy and paste the report again to reflect the updates
- Where are the Payroll Reports?
  - We do not have Payroll Reports in infoAdvantage. Control-D should still be utilized for HRIS Reports as was done prior to the new AFIS
- Can reports be sent/scheduled via Email?
  - This feature is still being tested and reviewed. Reports can be downloaded in Excel or PDF and emailed as an attachment. Reports can also be scheduled to be sent to infoAdvantage Inbox.

# Common Q&A

- When will the Production environment be made available for Report Developers to start working in instead of UAT?
  - All current Report Developers have access to the Production environment, however all report modifications are required to be completed and tested in UAT.
- Field names for universes for Report Developers to locate the correct data; is there information on data mapping from the system to universes/reports that would help clarify this?
  - The documentation we have currently is large and not very usable; it is a future plan to build usable reference material; however, it is not available at this time

# Common Q&A

- When should large reports be run?
  - Please schedule (before midnight) for nightly processing or run later in day (before 8pm).
- What is the Difference between Export Doc vs. Export Current report?
  - Document can have a single report (shown as a tab) or can have multiple reports(multiple tabs).Export document exports all the tabs/reports in a document whereas Export Current report exports only the current tab/report.
  - Another Export option is the Export Data to CSV. DO NOT use this option as it exports the underlying queries, not the filtered and calculated data

# Common Q&A

- Why does a Prompt show a portion of the total entries and give the warning "partial result"?
  - Up to 1000 entries – normal list
  - 50000 entries - dropdown with ranges
  - More than 50000 displays 'Partial Result' as all the entries are not shown in the LOV.
  - Change prompt option and search for possible input options in Advantage first
- Some data contained in AFIS tables are most helpful as references. For example, a list of all the Event Types, Posting Codes, or many others. Do you have any suggestions short of a report?
  - One time requests can be sent to BREAZ for this information, otherwise utilize infoAdvantage for more frequent lists

# Common Q&A

- Why do we get a blank column A and row 1 when we export to Excel?
  - Depends on the structure & formatting of the report. Check for hidden blank columns & adjust column widths. Fields formatted much wider than the actual size of the data can cause blank columns. Make sure the field width is just wide enough to display the longest data value.

# Common Q&A

- What if I need help with reconciling, modifying or creating a report?
  - Report Developers should work with agency Financial staff to reconcile report data
  - Questions or issues with reports, email BREAZ with details:
    - Report name & location (if in Favorites, save to On Demand folder so we have access to review)
    - Screen prints & prompt information used
    - Purpose or intent of report / Why or What are you trying to do?
  - Modifications and/or NEW Report request should go thru change request for review and prioritization.

**Kevin McRee**

ASET Technical Manager

# WORKSTATION CONFIGURATION AND TROUBLE SHOOTING

# Workstation Configuration Requirements

- Workstation Configuration Requirements can be found on the Agency SharePoint Site
  - Agency Project Reference Materials >> Infrastructure >> **End User Minimum Workstation Configuration Requirements** document

# Standard Web Browser Requirements for Report Developers

## Advanced Users

System	Internet Explorer *	Firefox	Silverlight*	JRE*	Flash*	Accessibility
TRIRIGA	10, 9, 8 WIN 7 (32 bit only)	ESR 24, 17	Required	Latest Ver of Java, 7	11	JAWS 14
Maximo	10 , 9 , 8 WIN 7 (32 or 64 bit)	ESR 17	N/A	Latest Ver of Java, 7	10	Windows Eyes 8 JAWS 14
Advantage, Travel, infoAdvantage	9 to 11 on WIN 7 10 to 11 WIN 8	ESR 24, 17	N/A	Latest Ver of Java, 7	11	Window Eyes 8 or JAWS 14
ProcureAZ**	9 to 10 WIN 7 (32 and 64 bit) 11 WIN 8	Latest Version	N/A	N/A	N/A	JAWS 14
HRIS	9 to 11 WIN 7 or 8		N/A	N/A	N/A	JAWS 14
Common	IE 9 and 10 WIN 7 32 bit	ESR 17	Silverlight*	Latest Ver of Java, 7*	11*	JAWS 14

### Legend:

“Advanced User” is defined a user who develops or creates reports from scratch and accesses the dashboard in infoAdvantage  
The latest version of Java should be used wherever possible

\* JRE is for developing ad-hoc reports on infoAdvantage; Flash is for the infoAdvantage Dashboard; and Silverlight is only needed for TRIRIGA)

\*\* ProcureAZ also supports the latest version of Chrome. Some versions of Safari are supported for all the applications listed above. Please see the *End User Workstation Minimum Configuration Requirements* document for more details.

ESR = Extended Support Release; IE = Internet Explorer; JAWS = Job Access With Speech; JRE = Java Runtime Environment

**Kevin McRee**

ASET Technical Manager

# REPORT DEVELOPMENT PROCESSES

# Report Development Processes

- Deployment and Release Management
  - Statewide reports
    - State ensures the quality of report content and performance
    - Change Control Request process will be used to request new or modifications to State developed reports
  - Agency reports
    - Agency is responsible for quality of the content
    - State will monitor for resource utilization and thresholds. Exceptions managed on a case-by-case basis.

# Report Development Processes

- Report review process and turnaround time for publishing reports from agencies
  - New reports created by agencies should be developed in UAT and placed in the Promotion Folder
  - As we have capacity, the State Report Team will review for performance issues only
  - Once reviewed the State Report Team will promote the report to Production (weekly on Friday evenings)
- Source Code Control is the responsibility of agency Report Developers thru use of agency folder structure in infoAdv

**Janice Foley**

GAO Agency Readiness Manager

# REPORT DEVELOPER SUPPORT

# Report Developer Support

- Documentation on the Agency SharePoint Site:  
Agency Coordinators>>Agency Go-Live Reference  
Materials>> Report Status Update
  - Report Design Information
    - New AFIS Report Sample Inventory
    - Maximo and TRIRIGA Report Samples
  - Report Status Information
    - Production Migration Status Report

# Report Developer Support

- User Community approach as we are all learning
- Monthly Lunch & Learns
  - September 14, 2015 12 p.m. – 1 p.m. in ADOA Room 300
- Goal will be to establish cross-agency sharing of:
  - What works and what does not work
  - Sharing of early successes, ideas, and products
  - Create agency connections as a source of support
- Looking for Agency volunteers for September meeting

# REFERENCE MATERIAL: JAVA CHALLENGES

# Java Challenges

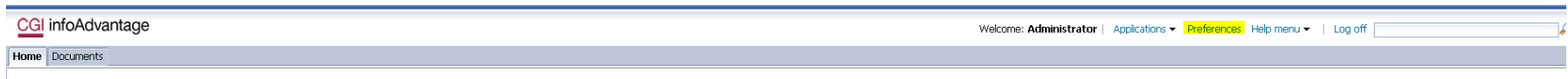
- For security purposes, the latest version of Java should always be used
- Adding the AFIS URL to Java's Exception Site list
  - The Exception Site List feature was introduced in the release of Java 7 Update 51 by adding the Advantage Financial URL to the Exception list allows users to run Rich Internet Applications (RIAs) that would normally be blocked by security checks.

## Procedure

- A. Open Configure Java
- B. Click the Security Tab
- C. Select the Edit Site List... button
- D. Select the Add button
- E. Select Ok or input URL:
  - UAT- <http://finance.az.gov>
  - PROD- <http://afis.az.gov>
- F. F. The URL should now show on the Exception Site List

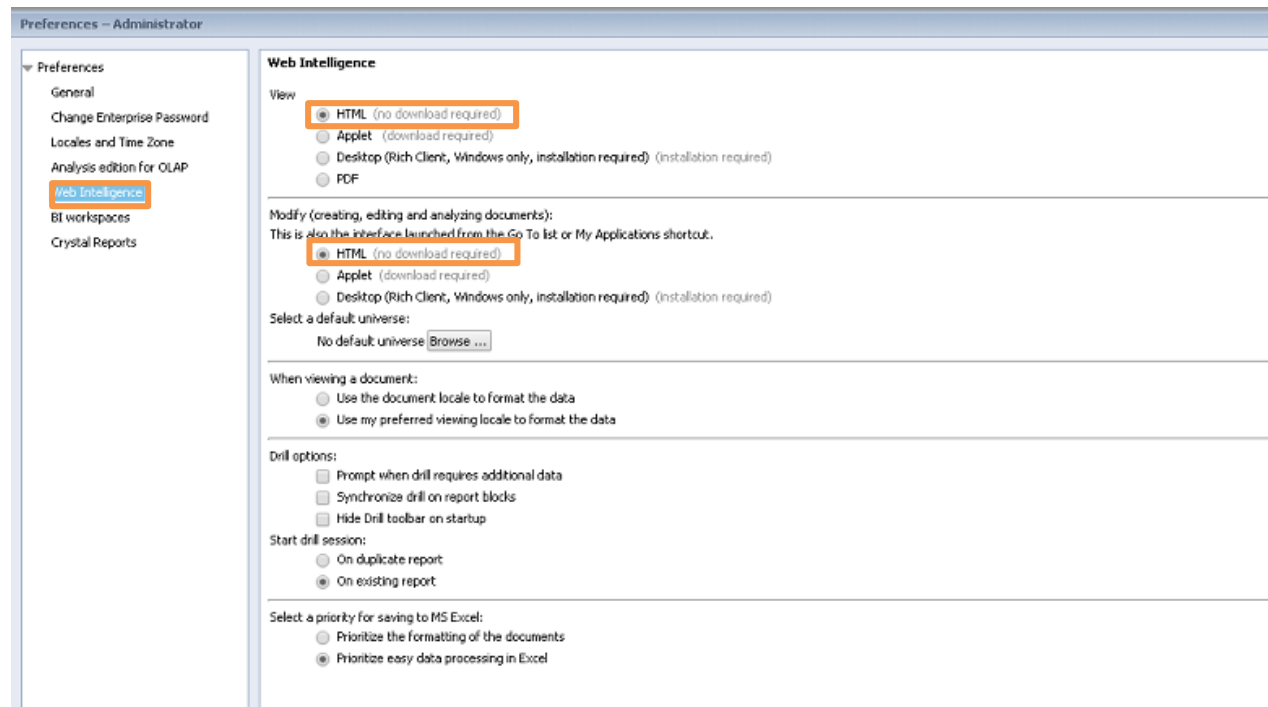
# Java Challenges Workaround

**Step 1:** Log into the application and get to the homepage. On the homepage click on “Preferences” at the top of the page.



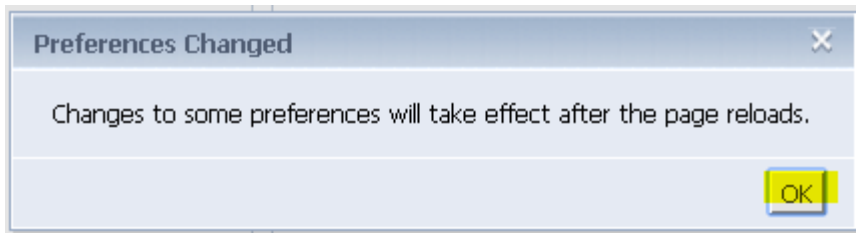
# Java Challenges Workaround

**Step 2:** Once you are in the Preferences tab, Choose the Web Intelligence option under the left panel. Then, under the “Modify” panel, choose the option “HTML (no download required)”. Then click on Save and close at the bottom.



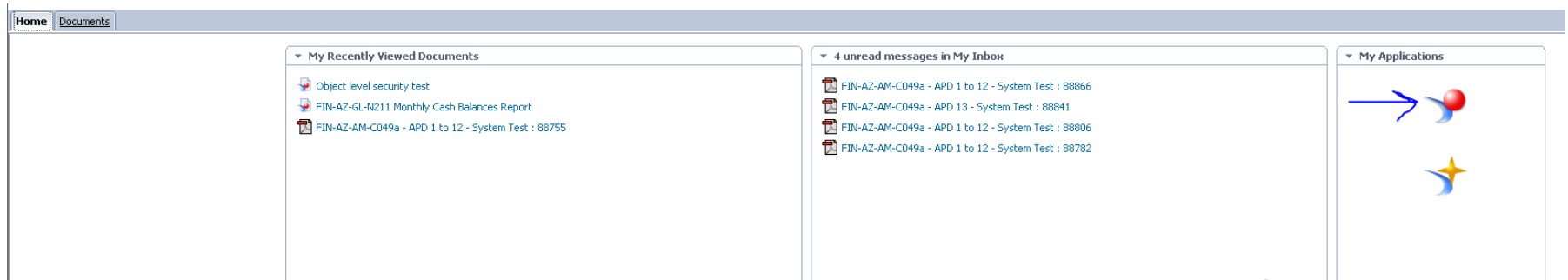
# Java Challenges

**Step 3:** Click on OK the Preferences Changed window. After this reload/refresh the page.



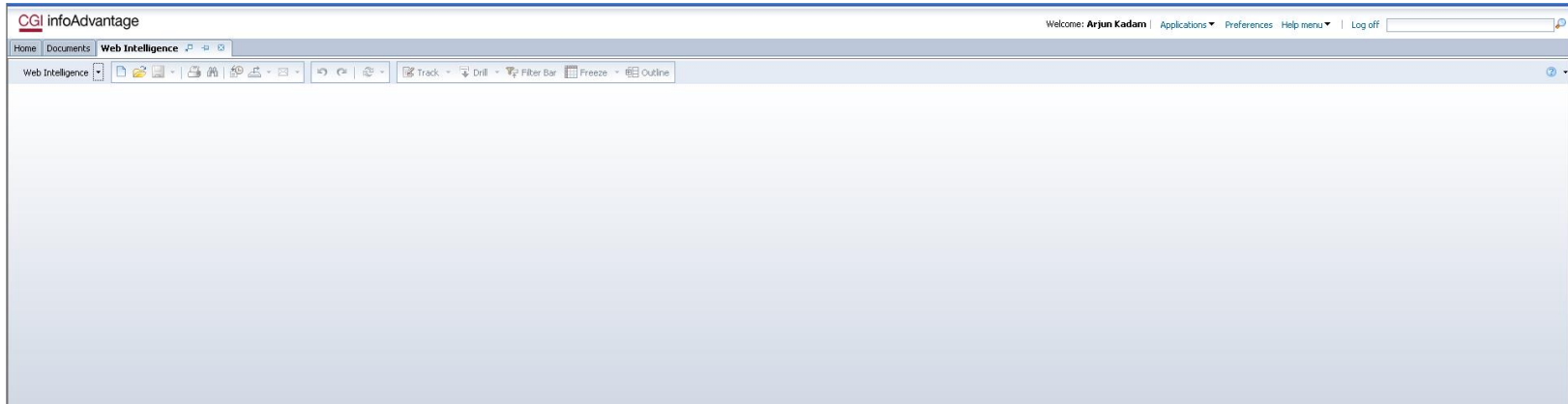
# Java Challenges

**Step 4:** After reloading the page, click on the Webi link as shown below. You should be redirected to the developer page.



# Java Challenges

**Step 5:** After clicking on the Webi link as shown above, you should be redirected to the page below:



**Note:** This workaround will provide almost 90 % of all development capabilities. The users will be able to develop new reports as well as modify existing reports. The “Data” tab which can be used to change the source of the report will not be available but the developer will not be needing this as of now.